

Members' Library Service Request Form

Date of Document	26/07/21
Originator	Caroline Rodgers
Originator's Ref (if any)	
Document Title	Staffing Report for the Creation of a Temporary Project Manager and Lead Business Analyst within the Improvement Team

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Additional information:

Authorised By	Sarah Fortune
Designation	Exec. Director for Council Resources
Date	01/09/21

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STAFFING REPORT – NEW POST

REPORT TO: Members' Library Service

BY: Executive Director for Council Resources

DATE: September 2021

SUBJECT: Staffing Report for the Creation of a Temporary Project Manager and Senior Business Analyst within the Improvement Team

1 PURPOSE

- 1.1 To seek Head of Council Resources approval under delegated powers for the creation of a **Project Manager and Senior Business Analyst** as a **temporary** change to the staffing structure.

2 RECOMMENDATIONS

- 2.1 To agree to the proposed changes to the staffing structure as outlined in the report.

3 BACKGROUND

- 3.1 These posts are being created to support the procurement and implementation of an Information and Case Management System for the ELHSCP and Children's Services.
- 3.2 The current Information and Case Management System, Mosaic provided by Servelec, was delivered through a framework from 2009 until 2014. Since then it has been delivered through a support and maintenance yearly contract.
- 3.3 The use of a rolling one year contract with Servelec has prevented the negotiation of better terms and conditions from the provider, leaving the ELHSCP and the Council open to higher pricing for upgrades and maintenance as well as a challenge to procurement regulations and governance.
- 3.4 The posts will lead the project to procure and implement an Information and Case Management System. Depending on the outcome of the procurement exercise it will either be a replacement or upgraded system.

- 3.5 The project will ensure a service specification is developed which will allow for the best service outcomes for the HSCP and Children's Services, The chosen system will require to be able to support the development of all health and social care services, as well as children's services.
- 3.6 The posts will be temporary for the duration of the project, expected to be around 2 years. The posts will be full time, 35 hours per week. The posts will be funded from the ELHSCP budget.
- 3.7 The Job Evaluation Team have evaluated these roles and the posts at grade 11 for the Project Manager post (£43,652 - £49,163 (2020/21 scale) and grade 10 for the Senior Business Analyst Post (£37,611 - £42,411 (2020/21 scale).

4 POLICY IMPLICATIONS

- 4.1 This report has no implications on policy.

5 INTEGRATED IMPACT ASSESSMENT

- 5.1 The subject of this report does not affect the wellbeing of the community or have a significant impact on equality, the environment or economy.

6 DISCLOSURE SCOTLAND REQUIREMENT

- 6.1 This post will require a **Basic** Disclosure check in order to comply with legislation/PSN Code of Connection.

7 RESOURCE IMPLICATIONS

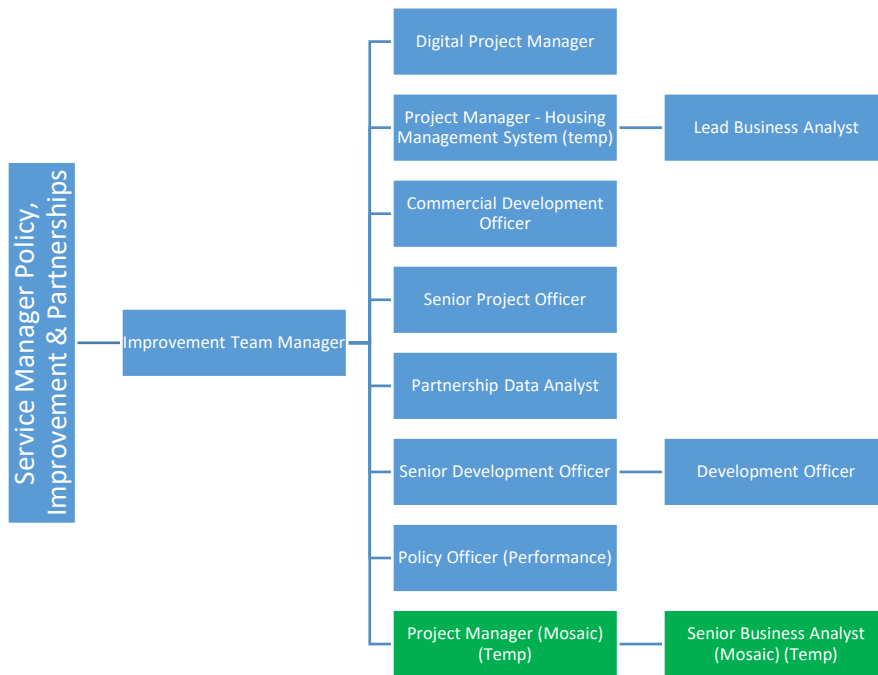
- 7.1 Financial – The costs of the posts is estimated to be around £120,000 per annum. The posts will be funded by ELHSCP.
- 7.2 Personnel – This post has been formally evaluated and will be advertised in accordance with the Council's Recruitment & Selection Policy. HR and the relevant Trades Unions have been consulted and are supportive of the creation of these two temporary posts.

8. BACKGROUND PAPERS

- Agreed Job Details Form
- Proposed Structure Chart

AUTHOR'S NAME	Caroline Rodgers
DESIGNATION	Improvement Team Manager Policy, Improvement & Partnerships Service
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DATE	20 July 2021

Proposed Structure Chart



**EAST LOTHIAN COUNCIL
Job Outline**

Post Title:	Project Manager – (Mosaic)
Service:	Communities & Partnerships - Improvement, Policy & Communications
Location:	East Lothian (currently remote working)
Immediate Supervisor:	Team Manager - Mosaic

Purpose of the Job

East Lothian Health & Social Care Partnership has decided to re-procure its case management system. The current system is embedded in multiple processes across several service areas and its replacement will be a significant change for the organisation. It is intended that the new system will enable the Council to provide a more co-ordinated, responsive and proactive service to service users while supporting the Council's aim of rationalising existing systems to reduce cost, risk and complexity.

The purpose of this role is to:

Plan, manage and deliver a project to successfully procure and implement the Partnership's Case Management System to an agreed deadline and within an agreed budget.

Define the scope and requirements for a new system, manage the procurement process and implementation in order to deliver the new system successfully.

Co-ordinate the efforts of project resources and / or third party consultants to bring the project to completion according to agreed project plans.

Be the direct interface with the Project Board, Partnership Senior Management Team and other senior managers within the Council, Partnership and Health Authority, providing best value, reassurance and support as required.

- To produce and maintain governance documentation appropriate to a project of this nature and scale using an agreed project management framework, including risk management, and using relevant organisational and change management techniques
- To create and manage the project team, ensuring the team has the right blend of knowledge, skills, abilities and experience to deliver the project according to the project plan
- To work collaboratively with, and ensure the relevant level of support from, services and staff required to deliver the project according to the project plan
- To build and maintain relationships with the supplier and service areas in order to ensure successful implementation
- To capture current and future state business and functional requirements for service redesign/modelling.

- To apply lean or similar principles throughout the project to ensure customer focus and efficiency underpin the work.
- To support the running of workshops and customer engagements to understand business need, benefits, risks and costs.
- To ensure the project outputs meet the overall requirements and the agreed project plan(s)
- To manage the project budget, define project benefits and track benefit realisation
- To identify innovative practice and translate this into practical opportunities, particularly where transformation and alternative service delivery models exist.
- To present, report and communicate complex business issues with a range of key stakeholders, including at Senior Management level.
- To effectively manage all required communication activities including workshop and events planning and execution, and all stakeholder engagement including the Project Team, Project Board and other stakeholders
- To participate in networking and contribute to learning and sharing of practice and experience, including working with other key staff and external organisations to ensure knowledge transfer within the project team and from the project team to other Council staff and services
- To deliver the key tasks and accountabilities in a way that reflects the Council's and Partnership's values, aims and objectives, contributing to the delivery of the Council's Transformation Programme and Digital Strategy.
- To plan and schedule and report on project timelines according to the agreed project plan using appropriate project planning tools
- To ensure that appropriate systems are in place to assist with the accurate and timely reporting of project plans and progress to the Improvement Team Manager, Service Managers, Project Board and members of the Council and Partnership Management Teams
- To apply the Council's Customer Services Standards and adhere to the principles and practice of equality as laid down in the Council's Equal Opportunities Policy
- To undertake such other duties appropriate to the grading of the post as directed by management.

Employee Responsibility

- Line management responsibility for a Project Team consisting of a small number of staff who may be recruited or seconded on a full-time or part-time basis to deliver the project.

Essential Requirements for this Role

Education:

- Educated to Degree Level or equivalent **and/or able** to demonstrate equivalent knowledge, skills and competencies gained through relevant experience.

Disclosure Scotland:

- This role requires **Basic Disclosure Clearance** to allow access to the Public Sector Network. ELC will submit a Police Act Disclosure application on behalf of the preferred candidate and receipt of the subsequent certificate will be **required prior to commencement**.

Scottish Social Services Council:

- None.

PERSON SPECIFICATION

Post Title:	Project Manager – (Mosaic)
Service:	Communities & Partnerships - Improvement, Policy & Communications
Location:	East Lothian (currently remote working)
Immediate Supervisor:	Team Manager - Improvement

Attributes	Essential	Desirable
Education, Registration & Training	<p>Educated to Degree Level or equivalent and/or able to demonstrate equivalent knowledge, skills and competencies gained through relevant experience.</p> <p>Basic Disclosure is an essential requirement of this role</p>	<p>PRINCE2 certification</p> <p>A full current clean driving licence</p>
Previous Experience (Paid & Voluntary Work)	<p>Experience of managing and delivering change in a multidisciplinary project environment</p> <p>Experience of procuring and delivering digital projects</p> <p>Experience of high level influencing, negotiation and relationship building</p> <p>Experience of using appropriate project management and improvement methodologies</p> <p>Experience in leading, managing and motivating project teams</p>	<p>Experience of supporting cultural change in large and complex change initiatives</p> <p>Experience of health & social care case management systems</p> <p>Experience of working in Scottish public sector/local government</p>
Knowledge/ Skills /Competencies	<p>Analytical and investigative skills</p> <p>Project Management Skills</p> <p>High level of competency in developing and managing a range of complex and competing project workstreams</p> <p>Resolving conflict and overcoming difficult situations</p>	<p>Ability in demonstrating a range of consultancy skills, with particular emphasis on collaborative working</p> <p>Proven record of ability to adopt innovative and creative practice</p>

	<p>Effective verbal and written communication skills at different levels of an organisation</p> <p>A detailed knowledge and understanding of political, legislative and policy requirements as they affect local government</p> <p>Organisational and time management skills</p> <p>Applied knowledge of challenging assumptions and conventions</p> <p>Applied knowledge of using digital technologies to drive service improvement</p>	<p>Ability to build and preserve effective relationships with partners / stakeholders</p> <p>Ability to facilitate workshops for both an internal and external audience</p> <p>Applied knowledge of business analysis tools and techniques</p> <p>Applied knowledge of requirements gathering, definition, business</p> <p>Applied knowledge of lean methodology</p> <p>Awareness of social housing/policy context</p>
<p>Personal Qualities</p>	<p>Ability to use own initiative</p> <p>Ability to seek solutions and deliver results</p> <p>Ability to prioritise a varied and complex workload</p> <p>Ability to work under pressure and meet deadlines</p> <p>Ability to work flexibly as part of a team</p> <p>Ability to develop effective relationships with stakeholders</p> <p>Ability to work to a high degree of accuracy, paying close attention to detail</p>	

AUTHORISATION:

I have read the information contained in this document and confirm that it is an accurate reflection of the duties and responsibilities for this post.

Jobholder*

Signed Date

Line Manager

Signed Caroline Rodgers Date 20 July 2021

Service Manager

Signed Paolo Vestri Date 23 July 2021

JOB DETAILS FORM

JOB OUTLINE	
JOB TITLE: Lead Business Analyst – Mosaic	JET CODE:
SERVICE: Policy, Improvement & Communications	
DIVISION: Communities & Partnerships	
REPORTING TO: Project Manager - Mosaic	
RESPONSIBLE FOR: Project Teams	
<p>JOB PURPOSE:</p> <p>East Lothian Health & Social Care Partnership has decided to re-procure its case management system. The current system is embedded in multiple processes across several service areas and its replacement will be a significant change for the organisation. It is intended that the new system will enable the Council to provide a more co-ordinated, responsive and proactive service to service users while supporting the Council's aim of rationalising existing systems to reduce cost, risk and complexity.</p> <p>The purpose of this role is to:</p> <ul style="list-style-type: none"> • Manage stakeholder engagement and change processes, ensuring appropriate levels of consultation and engagement are undertaken, any barriers are identified and removed/reduced, and changes will be embedded • Ensure that the focus of the project remains on the resolution of the business challenge/need delivered through enhancement and changes to key enablers including business processes, systems, data, and staff training • Undertake Business process reviews in a consultative manner with colleagues across the business, and process reviews, process analysis and re-design is undertaken to a high level and in a consultative manner • Focus on the activity that is required to embed the change and realise the benefits, working with colleagues to ensure these are delivered in line with the project plan • Ensure handover to business as usual is clearly documented and appropriate training, communication and engagement takes place to ensure outcomes are achieved • Ensure standards are maintained by working to agreed processes and procedures within the Transformation Programme. • Maintain awareness of sector wide initiatives / best practice in Business Analysis. 	
<p>MAIN DUTIES:</p> <ul style="list-style-type: none"> • To facilitate customer journey and experience mapping workshops to capture as-is and to-be business and functional requirements from the customer's perspective. • To analyse current services and processes, and identify and implement opportunities to optimise these, evaluating and establishing requirements using relevant techniques such as gap analysis. • To investigate problems and analyse options for services, working with stakeholders to identify objectives, opportunities and potential benefits available. 	

- To undertake business service redesign techniques as appropriate in the development of future service operating models
- To analyse complex data in support of service change and improvement, including using data to show meaningful improvements are being achieved.
- To contribute to developmental activities and project planning processes, supporting the design of products, frameworks, tools, and techniques
- To analyse business related data to support business case development and provide a sufficient level of evidence from which decisions can be made.
- To plan, design, manage and report business process tests and usability
- To facilitate workshops to understand business need, benefits, risks and costs.
- To effectively manage all required communication activities including, workshop and events planning and execution, and stakeholder engagement.
- To identify key stakeholders, tailoring communication to their needs and build relationships. Can take opposing views to reach consensus.
- To present, report and communicate business issues with a range of stakeholders.
- To apply a digital understanding to their work, identifying and implementing solutions for digital first.
- Promote the Council's vision and values and a corporate culture that is positive, customer focussed and supports employee engagement to the highest level
- Apply the Council's Customer Services Standards and adhere to the principles and practice of equality as laid down in the Council's Equal Opportunities Policy
- Take reasonable care of personal health and safety and ensure compliance with the Council's health and safety rules and legislative requirements
- Assist and deputise for the Project Manager.
- Any other appropriate duties, as requested by Management, commensurate with the grade for the post.

ESSENTIAL REQUIREMENTS FOR THIS ROLE

Qualifications/Experience:

- Degree level qualification or similar qualification **and/ or able** to demonstrate equivalent knowledge, skills and competencies gained through relevant experience.

Disclosure Scotland:

- None

Scottish Social Services Council:

- None

PERSON SPECIFICATION		
Attributes	Essential	Desirable
Education, Registration & Training	Degree level qualification or equivalent <u>and/or</u> able to demonstrate equivalent knowledge, skills and competencies gained through relevant experience	Qualification in Business Analysis PRINCE2, Agile or other project management certification A current driving licence and/or use of a vehicle to travel between locations
Previous Experience (Paid & Voluntary Work)	<p>Experience in business analysis or data research / business intelligence in complex organisations</p> <p>Experience of translating requirements into user needs, ensuring that these are detailed, accurate and consistent</p> <p>Experience of high level influencing, negotiation and relationship building</p> <p>Experience of using appropriate project management and improvement methodologies</p> <p>Experience in leading, managing and motivating project teams</p> <p>Experience of supporting cultural change in local authorities or similar organisational settings</p> <p>Working knowledge of business analysis tools and techniques to model difference scenarios/situations (existing, conceptual or proposed)</p> <p>Experience of improving business process through business process</p>	<p>Experience/ certification in lean six sigma</p> <p>Experience in leading, managing and motivating project teams</p> <p>Experience of supporting cultural change in local authorities or similar organisational settings</p> <p>Experience in designing / delivering business change and the development / Implementation of a change management plan to support the introduction of new services and initiatives</p> <p>Experience of supporting colleagues through change initiatives</p> <p>Experience of identifying stakeholders, their</p>

	<p>management methodology, including business process mapping.</p> <p>Experience of working with business colleagues to elicit business requirements, documenting and validating them</p> <p>Experience in requirements gathering, definition, data analysis, process analysis, business and functional requirements analysis, system design, testing implementation and change management.</p>	<p>influence and developing appropriate communication plans</p> <p>Experience of creating test plans, developing test cases from user needs and undertaking testing to ensure software is fit for purpose</p> <p>Experience of Health & Social Care Case Management Systems</p>
<p>Knowledge/ Skills /Competencies</p>	<p>Analytical and investigative skills</p> <p>Business Analysis Skills</p> <p>Ability to understand users and can identify what their needs are based on evidence. Ability to translate these needs and propose design approaches or services to meet them.</p> <p>Ability to specify requirements from both a business and user perspective to enable agreed changes to be implemented effectively.</p> <p>Ability to investigate, analyse, visualise, articulate and solve complex problems and concepts using comprehensive tools and techniques, and identifying and analysing options to assess feasibility and impact.</p> <p>Ability to identify and explore opportunities for service and business improvement including analysis, identification, prioritisation and implementation of improvements and efficiencies, thereby ensuring that the</p>	<p>Knowledge and understanding of political, legislative and policy requirements as they affect local government, particularly the public sector reform agenda</p> <p>Ability to review requirements, specifications and define test conditions. Identifying issues and risks associated with work whilst being able to analyse and report test activities and results.</p> <p>Ability to plan, design, manage and report business process tests and usability evaluations. Applying evaluation skills to see how appropriate or useful the defined process is going to be.</p>

	<p>organisation derives maximum value from services.</p> <p>Resolving conflict and overcoming difficult situations</p> <p>Effective verbal and written communication skills at different levels of an organisation including experience of delivering complex subjects through the facilitation of workshops, interviews and in writing</p> <p>Organisational and time management skills</p>	
<p>Personal Qualities</p>	<p>Ability to use own initiative</p> <p>Ability to prioritise a varied and complex workload</p> <p>Ability to work under pressure and meet deadlines</p> <p>Ability to work flexibly as part of a team</p> <p>Ability to develop effective relationships with stakeholders</p> <p>Ability to work to a high degree of accuracy, paying close attention to detail</p> <p>Ability to be creative</p>	
<p>Council Behaviours</p>	<p>We are Customer Focussed</p> <p>We Initiate and Embrace Change</p> <p>We Strive to be the Best we can be</p> <p>We make things Happen</p>	

	We work Together	
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FACTOR LEVEL DESCRIPTORS

WORKING ENVIRONMENT:

The Jobholder predominantly works in an office environment, with occasional travel for meetings, conferences etc.

There are no hazards associated with this role.

PHYSICAL CO-ORDINATION:

Physical co-ordination is predominantly required to use a keyboard when undertaking computing activities. The post will involve producing and reviewing complex documents and tracking changes and updating spreadsheets and financial and project management packages on a daily basis.

In the course of normal working the Jobholder is required to travel to various locations. No specialist driving skills are required.

PHYSICAL EFFORT:

The job is mainly undertaken, in a sedentary position and requires no more than a basic level of physical effort.

MENTAL SKILLS:

The job predominantly requires mental skills to research and analyse complex information, problems or solutions, and to develop strategies or plans requiring complex planning activity. Imagination, creativity and/ or innovation are also required in this post for example, in researching and developing potential solutions to complex issues such as service reviews for underperforming services.

The Jobholder will be responsible for scheduling the work and activities of him/her self, and project teams for complex projects. This will require forward planning or scheduling of work and developing of process flow charts etc.

The Jobholder will be responsible for developing project documentation which may involve financial, cultural, and operational problems and take into account unknown variables which will require the ability to conceptualise and envisage unknown variables, influencing factors and areas of uncertainty i.e. future technological developments, demographic and economic trends and political direction.

When new initiatives and/ or changes to services are identified, the jobholder will utilise business analysis skills to ensure the successful implementation of these initiatives ensuring that they broadly remain aligned with the Council's and/or Partnership's objectives and will include providing market insight and contract support whilst managing risk.

The Jobholder will report on plans and progress to the Project Manager, Team Manager – Improvement, Service Manager, Chief Executive and Depute Chief Executive and the Council

Management. On occasions the Jobholder will report direct into the Project Board Chair who will be a senior manager.

CONCENTRATION:

The job requires focus and concentration to undertake planning, research, analysis, project management reporting etc.

Typically the Jobholder requires periods in excess of two hours or more on a regular basis to analyse undertake the above.

The Jobholder will have be required to oversee a variety of different projects at any one time and in doing so will be required to deal with conflicting and simultaneous demands from a variety of services, re-prioritising workload(s) as required.

COMMUNICATIONS SKILLS:

The Jobholder requires excellent communications skills to persuade and influence senior officers, Service Managers and councillors that specific projects and proposals, such as alternative service delivery models and income generation initiatives are beneficial and cost effective. They will be required to respond to various challenges including political challenge and will have to demonstrate excellent negotiating and persuasive skills to ensure the success of the implementation of such initiatives.

The Jobholder will be required to chair meetings of staff from across all Council services and partner agencies and to present reports to Council committees, project boards and team meetings. In most cases the jobholder will work with the Project and/or Team Manager to convince people at a higher level. The Project and/or Team Manager will decide when they need to step in and do this or whether the jobholder can do this on their own.

DEALING WITH RELATIONSHIPS:

The Jobholder will be in regular contact and deal directly with senior officers (the Council Management Team and service managers), elected members, other employees of the local authority and senior officers from other organisations. The job entails working with staff at all levels across the council.

Although there are instances when the Jobholder has to progress difficult matters through meetings, discussions, consultations, negotiations these are delivered in a professional manner. The Jobholder will demonstrate emotional and professional resilience on a day-to-day basis.

They do not regularly, come into contact, with people who are abusive and/or threatening.

RESPONSIBILITY FOR EMPLOYEES:

The Jobholder does not have any direct line management responsibility, but may have responsibility for overseeing a Project Team or Teams consisting of a small number of staff seconded on a full-time or part-time basis to deliver an initiative or initiatives. They will be responsible for the allocation and checking of work ensuring that the project is completed successfully.

They are not responsible for the implementation of personnel policies and procedures.

RESPONSIBILITY FOR SERVICES TO OTHERS:

The job predominantly involves responsibility for services to the whole of East Lothian through contributing to the design, development and improvement of systems and services. They will contribute to the delivery of the Transformation Programme and culture change across the whole council and Health & Social Care Partnership.

RESPONSIBILITY FOR FINANCIAL RESOURCES:

The Jobholder will not be a budget holder. However they may have responsibility for identifying savings and generating additional income in line with the council's Transformation programme financial targets. On occasion they may be required to identify external funding streams to support relevant opportunities and to complete funding and grant applications.

RESPONSIBILITY FOR PHYSICAL AND INFORMATION RESOURCES:

The job involves responsibility for developing/ managing information resources including the identification and assessment of options against available resources, ensuring system objectives are fulfilled, and reviewing performance on an on-going basis for projects they are involved in, in line with Team requirements set by the Team Manager.

They are also responsible for setting up monitoring and tracking systems and procedures to ensure the smooth delivery of projects.

They are responsible for the safe use of office equipment such as PC, printers and laptop.

INITIATIVE & INDEPENDENCE:

The Jobholder is required to exercise considerable initiative in the course of normal working. The job predominantly involves working within the broad framework of Council policy to progress a wide range of activities. The work will involve responding independently to unanticipated and difficult problems/ situations and making decisions/ exercising initiative/ making recommendations with access to manager/ more senior officers for advice and guidance. They will occasionally lead (e.g. chairing corporate working groups), and may contribute to, the development of corporate strategy and policy.

They are expected to work autonomously on a day to day basis. From time to time professional advice required by the Jobholder may be sought externally from other bodies and local authorities who have gone through similar exercises.

KNOWLEDGE:

The Jobholder must be educated to degree level and/or have extensive experience in using appropriate business analysis and improvement methodologies as well as delivering process change and supporting cultural change in local authorities or similar organisational settings.

The Jobholder must maintain an awareness of change in Local Government legislation; the financial climate under which local government operates; the debate around and influencers of cultural change and transformation in the public sector; new service delivery models such as Arms' Length External Organisations etc.

AUTHORISATION:

I have read the information contained in this document and confirm that it is an accurate reflection of the duties and responsibilities for this post.

Jobholder*

Signed Date

Line Manager

Signed Caroline Rodgers Date 20 July 2021

Service Manager

Signed Date .